# **Project Management System Baseline Plan**

Graphic Summaries: Technical Progress vs. Costs Incurred

# U.S. Department of Housing and Urban Development Office of Administration

1. Proj															3a.	Nam	me of GTR		3b. GTR Approval (Signature)	Date	9. Ag	9. Agreement No.  10. Project Code  11a. Originally Approved Agreement Value  \$					
2. Nan															4a.	Name	me of Contracting Officer		4b. Contracting Officer Approval (Si	gnature)	10. P						
															5.	Nam	me of GTM		8a. Originally Approved Agreement	Date Completion Date							
															6a.	Base	seline Plan Number		8b. Currently Approved Agreement	Completion Date	11b.	11b. Currently Approved Agreement Value \$ 11c. Proposed New Total Value (Per this Plan) \$					
														_	6b.	Base	seline Plan Date		8c. Proposed New Completion Date	(Per this Plan)	11c.						
					18	. Planne	ed Cost I	Incurrer	nce					ı					21. Planned Tech	nnical Progress							
Yrs. \$000	Prev. Pds												Sub Total	Fut. Pds.	Grand Total	d No.	Years lo. 21a. Tasks/Activities	Prev Pds					Fut Value Pds. Each T	of Comments ( Y or N)			
																1	1	1 40					1 40.				
																2	2										
																3	3										
-																4	4										
																5	5										
																6	6										
																7	7										
																8	8										
Dollars Cumu- lative												X				9	9										
20.													/			10   Le	_egend Plan 1 Start Date →▼		Milestone ▼ ← Plan 1 End I	Date		22. Total	a.				
19. Dollars Each Period																23	Current Plan Start Date → 23. Proposed New Completion Date (Per the	<u>♣</u> nis Plan)	— Current Plar Part Completed to Date	n End Date	omp. Date	25. Estimated Compl. Da	d Time Overrun (Fro ate (Item 23 minus Ite	m Currently Apprv. m 8b.) Wks.			
15. Person Preparing Report													<i>V</i> \		<u>/</u>	1	,		16. Performer's Officia			17. Date Rec'd by HUD					
a. Name b. Date Plan Prepared c. Preparer's Initials									tials	a.	Nam	me	b. Sign	ature	c. Title		d. Date Signed										

## **Project Management Systems Forms**

**Public reporting burden** for this collection of information is estimated to average 8 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Paperwork Reduction Project (2535-0091), Office of Information Technology, U.S. Department of Housing and Urban Development, Washington, D.C. 20410-3600. This agency may not conduct or sponsor, and a person is not required to respond to, a collection information unless that collecton displays a valid OMB control number.

#### Do not send this form to the above address.

The HUD Project Management System utilizes two basic forms to plan and control the use of project resources. The Baseline Plan, form HUD-441.1, details the work to be performed. The Progress Report, form HUD-661.1, compares actual progress with the approved Baseline Plan. These forms are divided into numbered boxes; boxes containing data common to both reports will have the same number. If a report does not require certain data, the numbered box does not appear on the form.

Additional Instructions for completing these forms will be contained in the HUD Project Management System Handbook, which may be obtained from the Government Technical Representative (GTR). HUD contractors and assistance awardees shall comply with the instructions below when preparing their forms. Forms prepared improperly or submitted with errors will be returned to the awardee for corrections and resubmission.

## **Project Management Baseline Plan (Form HUD-441.1)**

The Baseline Plan displays two graphic summaries: 1) cumulative planned costs, and 2) scheduled Tasks or Activities. The total planned costs should equal the Agreement value. The Tasks listed should be the same as the tasks in the Agreement Statement of Work. Brief instructions for completing the Baseline Plan follow.

#### Box No.

- 1. Enter title of Agreement.
- 2. Enter name and address shown in the Agreement.
- 3a. Enter the name of the Government Technical Representative (GTR).
- 3b. Leave blank.
- 4a. Enter name of the Contracting (or Assistance Agreement)Officer.
- 4b. Leave blank.
- 5. Enter the name of the Government Technical Monitor (GTM), if any.
- 6a. The original is number "1". Revisions are numbered sequentially.
- 6b. Enter date Plan or Revised Plan was signed by performer's certifying official.
- 8a. Enter the project completion date as defined in the original Agreement.
- 8b. Enter the project completion date as revised by written Agreement modification.
- 8c. Enter proposed completion date per this revised Baseline Plan, if applicable,

- 9. Enter Agreement Number as shown on the signed Agreement.
- 10. Enter Project Code (obtained from GTR).
- 11a. Enter original Agreement value.
- 11b. Enter Agreement value as it may have been revised by written Agreement modification.
- 11c. Enter proposed new Agreement value, if applicable.
- 15. Enter name and date; initial by preparer.
- 16. Enter name, date and signature.
- 17. Leave blank.
- 18. To complete Planned Cost Incurrence Section:
  - (a) Enter reporting period dates across the top of the chart corresponding to the length of the Agreement.
  - (b) Enter a dollar scale appropriate to the Agreement value in the left column.
  - (c) Draw a cumulative planned cost curve on the chart.
  - (d) Indicate any revised plan using the legend shown for "Current Plan".
- 19. Enter the planned dollars for each reporting period.
- Enter the cumulative dollars for each reporting period corresponding to the planned cost curve on the chart and to total in Box 11b.
- 21. Enter a calendar arrangement across the top.
- 21a. Enter the Tasks/Activities as listed in the Agreement. Draw in a schedule bar for each as indicated in the Legend.
- 21b. Enter the planned dollar value for each Task/Activity.
- 21c. Enter Task comments, if any.
- 22a. Enter the sum of the dollar value of each Task (must agree with the total cumulative planned dollars in Row 20 and total in Box 11b).
- 23. Enter date shown in Box 8c, if any.
- 24. Show number of calendar weeks variance from original completion date, if applicable.
- 25. Show number of calendar weeks variance from revised completion date, if applicable.

form **HUD-441.1** (12/95)
Previous editions are obsolete Submit an Original and three copies ref Handbook 2210.13

# **Project Management System Baseline Plan**

Graphic Summaries: Technical Progress vs. Costs Incurred

## U.S. Department of Housing and Urban Development Office of Administration

I. Project Title	3a. Name of GTR	3b. GTR Approval (Signature)	9. Agreement No.				
Heating Multifamily Buildings Via Solar Energy	Joe Smith	Date Jan. 31, 1982	H-0123				
2. Name and Address of Performing Organization	4a. Name of Contracting Officer	4b. Contracting Officer Approval (Signature)	10. Project Code				
International Energy Sources, Ltd.	Frank Jones	Date	7.2.11.000				
650 Perry Street Boston, Mass. 20001	5. Name of GTM	8a. Originally Approved Agreement Completion Date	11a. Originally Approved Agreement Value				
	William Anderson	August 31, 1982	\$ 169,230				
	6a. Baseline Plan Number	8b. Currently Approved Agreement Completion Date	11b. Currently Approved Agreement Value				
	2	August 31, 1982	\$ 187,488				
Name of Project Manager George L. Kahn Phone (617) 123-4567	6b. Baseline Plan Date	8c. Proposed New Completion Date (Per this Plan)	11c. Proposed New Total Value (Per this Plan)				
	Jan. 15, 1982	Sep. 5, 1982	\$ 187,488				

																	Jan	1. 15, 1982		Sep. 5,	1982						4	\$ 187,488			
	18. Planned Cost Incurrence														21. Planned Technical Progress																
Yrs.	1981 ▼ 1982														Years		198	1	,	7			1982				21b.	21c.			
\$000	Prev. Pds	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sub Total	Fut. Pds.	Grand Total	d I	o. 21a. Tasks/Activities Pre		Sep Oct	Nov	Dec	Jan	Feb	Mar Apr	May	7 Ju	un Jul	Aug Fut Pds.	Dollar Value of Each Task	Comments ( Y or N)
20 <u>0</u>	١	ual Cost Work Pro	oduced			·											1	1 Select Demonstration Site	Y	Φ 7	7									\$6,270	N
18 <u>0</u>		n One — rent Pla				I +											2	2 Prepare for Demonstration	•		Φ <b>1</b>	<b>Y</b>								\$25,392	N
16 <u>0</u>						_				_							3	3 Conduct Demonstration			'	<b>'</b> _				<u> </u>				\$74,823	N
14 <u>0</u>					•	<b>/</b> \		1	Л								4	4 Evaluate Demonstration							<b>V</b>		4	<b>→ ▼</b>		\$63,482	N
12 <u>0</u>							1	V									5	5 Prepare Project Report										<b>Y</b>	▼	\$17,421	N
10 <u>0</u>																	6	6													
8 <u>0</u>																	7	7													
60																	8	8 A. Site Review Panel Meeting													
Dollars Cumu- lative		6,248	6, 516	31,453	50,214	69,858	88,576	1, 637	1,012	9,502	5, 718	3, 252		187,488	$\bigvee$	187,488	g	9 B. Solar System Installed													
20. B			16	3.	5(	99	8	101,	121,	139,	156,	173,		18	$/ \setminus$	18	10	O C. System Removed													
Dollars Each Period		6,248	10,268	14,937	18,761	19,644	18,718	3,061	19,375	3,490	17,216	16,534	1,326					egend Plan 1 Start Date →  Current Plan Start Date →	<b>.</b>	Milestone     Part Com	— npleted	← Cu I to Dat	rrent Pla	n End				22. Total		a. 187,488	
			10	14	18	19	18	13,	15	18,	17	16	14,				2	23. Agreement Completion Date (Latest Estimate) September 5, 1982	)	24. Estimate (Item 23				n Origi	nally Approve 1	d Com <sub>l</sub> Wks.		25. Est Compl	timated Time C . Date (Item 23	Overrun (From 8 8 minus Item 8	Currently Approved o.) 1 Wks
						•	15. Per	son Pre	paring P	lan								16. Performer's Official Certifying Plan 17. Date Rec									7. Date Rec'd by				

Page 1 of

b. Signature

c. Title

Project Manager

HUD

Jan. 19, 1982

d. Date Signed 1/15/82

a. Name

Fred Team

Previous editions are obsolete

c. Preparer's Initials

a. Name

George L. Kahn

b. Date Plan Prepared

Jan. 6, 1982